

# SmartOffice Mobile for Palm User Guide

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# Introduction

SmartOffice Mobile for Palm is a custom application developed by E-Z Data to synchronize data between SmartOffice® and a Palm OS device. The application uses iAnywhere Solutions' Ultralite database and MobiLink Server to synchronize data without interfering with existing applications on the device.

The following record types can be synchronized:

- Contact Individual
- Contact Business
- Activity
- SmartPad
- Policies
- Investments

# Installing SmartOffice Mobile for Palm

- 1. Log into SmartOffice.
- 2. From the side menu, click **User Setup** and **Installations** to open the Installations spreadsheet.
  - User Preferences
  - User Management
  - Record Sharing
  - Installations
  - Homepage Personalization
- 3. The **Installations** spreadsheet appears and displays all the available installations. From this spreadsheet, click the **SmartOffice Mobile for Palm and Pocket PC** link.
- 4. Select the **Click here to download and install SmartOffice Mobile for Palm** option to begin the installation file download.



5. From the File Download dialog box, click the **Open** button to start the installation. Alternately, the installation file can also be saved to the PC and installed from the saved location.

File Down	load 🔀					
?	Some files can harm your computer. If the file information below looks suspicious, or you do not fully trust the source, do not open or save this file.					
	File name: ezm_palm.exe					
	File type: Application					
	From: 192.168.2.54					
	This type of file could harm your computer if it contains malicious code.					
	Would you like to open the file or save it to your computer?					
	Open Save Cancel More Info					
	Always ask before opening this type of file					

6. If the username assigned to the Palm device does not appear in the **User** field, click the down-arrow at the end of the field and select it before clicking the **Done** button.

🖳 Install Tool					×
User: Test File(s) listed below will be installed time you perform a HotSync operat		held the	<b>▼</b> next		
File Name	File Size	Destin	ation	<u>A</u> dd	1
📓 SmartOffice.prc	511KB	🚽 Ha	ndheld	<u>R</u> emove	j
				Done	
			Change Destination		
Tips: Find other applications to install on your handheld at http://www.palm.com The 'Add' button looks first in the \ADD-ON folder inside your C:\PROGRAM FILES\PALM folder. This folder is a convenient place to store downloaded handheld files.					

7. When prompted, begin a HotSync on the PDA to install SmartOffice Mobile. Once the HotSync is complete, click the **OK** button.



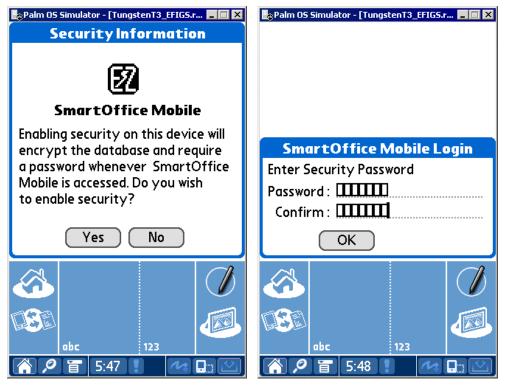
# Setting Up SmartOffice Mobile for Palm

Accessing SmartOffice Mobile on the Palm OS® Device

To start SmartOffice Mobile, tap the SmartOffice icon.



When launching SmartOffice for the first time, the **Security Information** window is displayed. The user will have the option to either enable or disable security for the device. Once security is enabled, the only way to remove it is to uninstall and reinstall the SmartOffice Mobile application.



Click the **Yes** button to enable security and display the **SmartOffice Mobile Login** window. The password is required each time SmartOffice Mobile is launched. The password must be at least 6 characters with at least one alpha and one numeric character. The password can be changed at any time by accessing the Security Password option from the main SmartOffice Mobile menu. Once the password has been entered and the user taps the **OK** button, the **Synchronization Options** window opens.

Beach and the second state of the second state					
Sync Method: ☑ HotSync Protocol: ☑ TCP/IP □ HTTP					
Smart	_	_ogin In <sup>.</sup>	form	ation:	
Office User	: reno : danie				
	·····	ined [ er Deta		CS User	
Host Port		68.2.171			
		Done			
	abc	123			
<b>(</b>	間 11:		1		

**SyncMethod:** By default, the HotSync option is selected for use with a cable/cradle connected to a PC with Palm Desktop and the HotSync Manager installed. This option can be cleared for synchronization with a wireless enabled device.

**Protocol:** Select the communication protocol used to communicate with the MobiLink Server. The options are TCP/IP, HTTP, or HTTP using a web server. An additional checkbox is displayed when HTTP is selected. This information will be provided by E-Z Data for SmartOffice Online users and by the IT department of corporate implementations.

**SmartOffice Login Information:** The Office, User, and Password for accessing SmartOffice must be entered in the appropriate fields. To enter the password, tap the **Unassigned** box, enter and confirm the SmartOffice login password, and tap the **OK** button. The password now shows as **Assigned**. If the SmartOffice One Card System (eOCS) is being used with SmartOffice, select the **eOCS User** checkbox to enable One Card System Outcomes when tracking activities.

**MobiLink Server Details:** The host URL or IP address and port assigned the MobiLink Server must be entered in order to synchronize successfully. This information is provided by E-Z Data for SmartOffice Online users and by the IT department of corporate implementations.

Once the correct information has been entered on the Synchronization Options window, tap the **Done** button to save the information.

### Setting Up SmartOffice Mobile Synchronization Criteria

1. From the side menu, click **Synchronization** and select **Mobile Device Setup** to launch the Synchronization Setup Wizard.



2. From the first window of the Synchronization Setup Wizard, click the Next button.

🖉 SmartOffice	
SmartOffice Mobile Device - Synchroniz	ation Setup Wizard
Welcome to the SmartOffice for Mobile Do Next to proceed.	evice Synchronization Setup Wizard. Click
	SmartOffice Mobile Device Synchronization
<back next=""></back>	Finish Cancel

3. Choose to synchronize all contacts or selected contacts and click the **Next** button.

🖉 SmartOffice		×
SmartOffice Mobile Device - Contact S	election	
Define the contact records to be synchr	onized.	
	Contact Selection All Contacts C Selected Contacts	
< Back Next >	Finish	Cancel

If All Contacts is selected, continue with step 4. Otherwise, the Filter/Set Selection dialog box opens. Select a set or filter of contacts to synchronize.

🕗 SmartOffice	×
Filter/Set Selection	
Select contacts to synchronize based on a filter or set. © Filter © Set	
Set Clients	
OK Cancel	

4. Select a date range of future and past activities for synchronization. Click the **OK** button to continue.

SmartOffice		×			
SmartOffice Mobile Device - Activity Selection					
Select the type and d	ate range of activities to be sy	nchronized.			
	Activity Type	Activity Date Range Next 60 day(s) Previous 30 day(s)			
< Back	Next >	Finish Cancel			

5. From the SmartPad Selection window, set the number of SmartPad entries to synchronize. Alternately, a range in months or just SmartPad entries manually added as notes can be synchronized.

🚰 SmartOffice										×
SmartOffice Mobile Device - Smart	Pad	Sele	ction							
Select the number of SmartPad enti	ries to	o do	wnio	ad fo	ог еа	ch c	onta	ct.		
	Spe	cify S	imar	tPad	Dow	nloa	ading	j Opt	ions	;
		2								
		0	0	0	Θ	0	0	0	0	
	9	Smart	Pad e	entrie:	s for l	ast 🕃	3	moi	nths	
		Sm	artPa	d No	tes O	nly [				
Warning: Downloading a large num the time required to sync			artP	ad er	ntrie	s cai	n dra	mati	ically	rincrease
< Back Next >				Fini	sh					Cancel

6. The final Synchronization Setup Wizard window is a review of the information selected for synchronization. If all of the information is correct, click the **Finish** button.

🎒 Smai	rtOffice	×
Smart	Office Mobile Device - Download Description	
Synchro	onization will be based on the selected criteria:	
	- All Contacts. - All Activities for the next 60 days and previous 30 days	-
	<ul> <li>Five SmartPad(s) per Contact.</li> </ul>	
4	To change the selection, click the Back button.	
1	Click the Finish button to save the Setup.	
< Ba	ck Hext > Finish Cancel	]

# **Preparing Data for Synchronization**

After the criteria for synchronization has been selected, an initial synchronization must be done.

- 1. From the SmartOffice side menu, click **Synchronization** and select **Update Mobile Device** to open the Update Mobile Device with Changes dialog box.
- 2. Select the **Perform a full refresh of the data from SmartOffice** radio button to populate data meeting the synchronization criteria to a database table used for keeping track of the information that has been synchronized.
- 3. Perform a HotSync with the PDA to complete the initial synchronization.

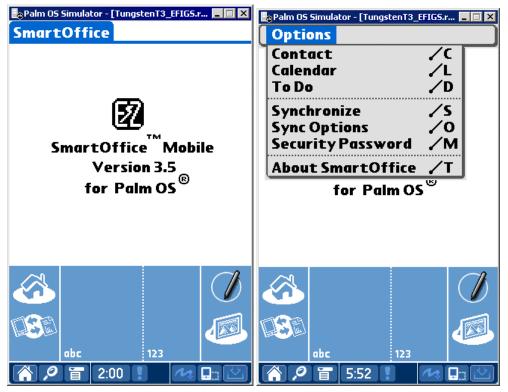
After the initial synchronization, complete the following steps to add new information from SmartOffice:

- 1. From the SmartOffice side menu, click **Synchronization** and select **Update Mobile Device** to open the Update Mobile Device with Changes dialog box.
- 2. Select the **Update Mobile Device with new records and modifications** radio button to populate any additions made in SmartOffice to the database table so they will be synchronized on the next HotSync. Any data added or modified in SmartOffice Mobile on the PDA will automatically be added to SmartOffice on the next HotSync.

# **Using SmartOffice Mobile**

### SmartOffice Tab

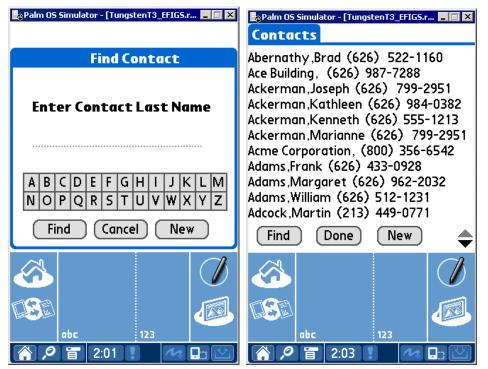
Tap the **SmartOffice** tab to open a list of options.



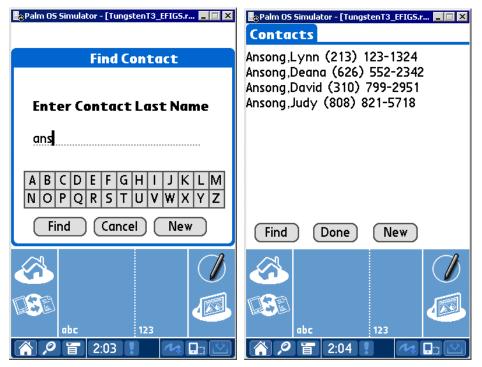
# **Contact Tab**

From the **SmartOffice** tab, select **Contact** to open the Find Contact dialog box. There are three ways to search for a **Contact** (Individual or Business) record:

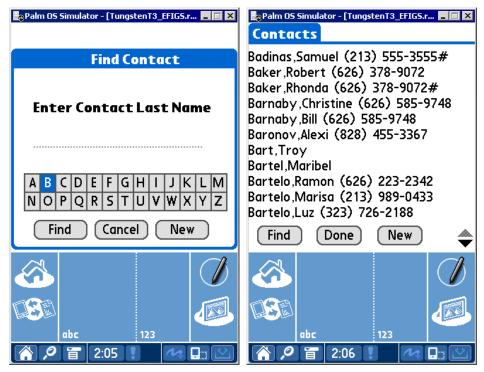
1. Tap the **Find** button without entering any search criteria to display the global Contacts list.



2. Enter a portion of the business name or individual contact's last name and then tap the **Find** button to display the **Contacts** tab matching the search criteria.

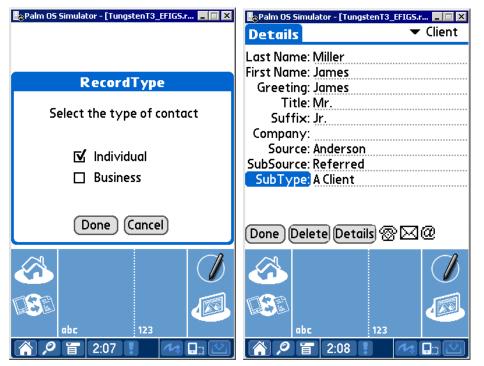


3. Tap the first letter of the business name or individual contact's last name to display the **Contacts** tab matching the search criteria.



### **Creating an Individual Contact Record**

- 1. From the **SmartOffice** tab, select **Contact** to open the Find Contact dialog box.
- 2. Tap the New button to open the Record Type dialog box.
- 3. Select the **Individual** option and then tap the **Done** button to display the **Details** tab.



4. Enter the contact information and then tap the **Details** button as well as the **Phone**, **Address**, and **Web Address** icons to enter the corresponding information.

5. Tap the **Done** button to save the information and display the **Contact View** tab.



# **Contact Personal Dialog Box**

1. From the **Contact View** tab, tap the **Details** button to open the **Contact Personal** dialog box.

Palm 05 Simulator - [TungstenT3_EFIGS.r 🔳 🗆 🗙					
James Miller (James)					
Cor	ntact Perso	nal			
Birth Date	05/25/1960				
Occupation	Medical Surg	eon			
JobTitle	Doctor				
Income	500000				
Dor	ne Cancel	)			
abc	123				
	2:10	M 🗔 🖄			

2. Enter the contact personal information and then tap the **Done** button to save the additions.

# **Contact Phone List**

- 1. From the **Contact View** tab, tap the **Phone** icon to display the **Phone List** tab.
- 2. Tap the **New** button to open the Phone Details dialog box.

Balm OS Simulator - [TungstenT3_EFIGS.r × Phone List James Miller	Palm OS Simulator - [TungstenT3_EFIGS.r 📮 🔲 🗙
Residence (909) 764-9845 💮 Business (909) 776-9086 💮	Phone Details
	Type ▼ Residence Area Code 909 Phone# 764-9845 Exten. Remarks
Done New 🖂 @	Done Delete 🗹 Preferred

- 3. Tap the **Type** drop-down arrow to specify the phone type.
- 4. Enter the remaining phone information and then tap the **Done** button to save the additions.

### **Contact Address List**

- 1. From the **Contact View** tab, tap the **Address** icon to display the **Address List** tab.
- 2. Tap the **New** button to open the Address Details dialog box.

Address List James Miller	Palm 05 Simulator - [TungstenT3_EFIGS.r 🗖 🖬 🕅			
Residence 234 North Ave Miller City CA 24564 Business 534 South Ave. Minalsa CA 44654	Type▼ ResidenceAddress234 North AveLine 2			
Done New 🛞 @	Done Delete 🗹 Preferred			

- 3. Tap the **Type** drop-down arrow to select the address type.
- 4. Enter the remaining address information and then tap the **Done** button to save the additions.

**Note:** Both the preferred Phone Number and preferred Address are displayed on the **Contact View** tab of the Contact record.

#### **Modifying a Contact Record**

- 1. From the **Contact View** tab, tap the **Edit** icon to open the **Details** tab.
- 2. Modify the information as necessary and then tap the **Done** button to save the changes.

#### Modifying a Contact's Phone Number

- 1. From the **Contact View** tab, tap the **Phone** icon to display the **Phone List** tab.
- 2. Tap the number for modification to open the Phone Details dialog box.
- 3. Modify the information as necessary and then tap the **Done** button to save the changes.

#### Modifying a Contact's Address

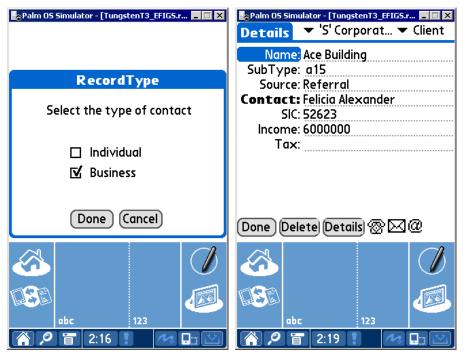
- 1. From the Contact View tab, tap the Address icon to display the Address List tab.
- 2. Tap the address for modification to open the Address Details dialog box.
- 3. Modify the information as necessary and then tap the **Done** button to save the changes.

#### **Deleting a Contact Record**

- 1. From the **Contact View** tab, tap the **Edit** icon to display the **Details** tab.
- 2. Tap the **Delete** button to open the **Delete Record** dialog box.
- 3. Tap the **OK** button to delete the selected record from the palm device and the server. **Note:** Perform a HotSync<sup>TM</sup> operation to synchronize the data.

# **Creating a Business Contact Record**

- 1. From the **SmartOffice** tab, select **Contact** to open the Find Contact dialog box.
- 2. Tap the **New** button to open the Record Type dialog box.
- 3. Select the **Business** option and then tap the **Done** button to display the **Details** tab.



- 4. Enter the business information and then tap the **Details** button as well as the **Phone**, **Address**, and **Web Address** icons to enter the corresponding information.
- 5. Tap the **Done** button to save the information and display the **Contact View** tab.



# **Contact Personal Dialog Box**

1. From the **Contact View** tab, tap the **Details** button to open the **Contact Personal** dialog box.



2. Enter the business information and then tap the **Done** button to save the additions.

#### **Business Phone List**

- 1. From the **Contact View** tab, tap the **Phone** icon to display the **Phone List** tab.
- 2. Tap the **New** button to open the Phone Details dialog box.
- 3. Tap the **Type** drop-down arrow to select the phone type.
- 4. Enter the remaining phone information and then tap the **Done** button to save the additions.

#### **Business Address List**

- 1. From the Contact View tab, tap the Address icon to display the Address List tab.
- 2. Tap the New button to open the Address Details dialog box.
- 3. Tap the **Type** drop-down arrow to select the address type.
- 4. Enter the remaining address information and then tap the **Done** button to save the additions.

**Note:** Both the preferred Phone Number and preferred Address are displayed on the **Contact View** tab of the Contact record.

### Modifying a Business Record

Modifying a Business record is identical to the steps required in modifying an Individual Contact record. Please refer to the Modifying a Contact Record section.

#### Modifying a Business Phone Number

Modifying a Business phone number is identical to the steps required in modifying a Contact phone number. Please refer to the Modifying a Contact's Phone Number section.

#### **Modifying a Business Address**

- 1. From the Contact View tab, tap the Address icon to display the Address List tab.
- 2. Tap the address for modification to open the Address Details dialog box.
- 3. Modify the information as necessary and then tap the **Done** button to save the changes.

#### **Deleting a Business Record**

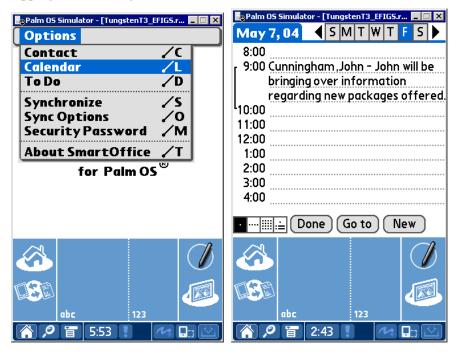
- 1. From the **Contact View** tab, tap the **Edit** icon to display the **Details** tab.
- 2. Tap the **Delete** button to open the **Delete Record** dialog box.
- 3. Tap the **OK** button to delete the selected record from the palm device and the server. **Note:** Perform a HotSync<sup>™</sup> operation to synchronize the data.

#### Calendar

The Calendar views are: DayView, WeekView, MonthView and AgendaView.

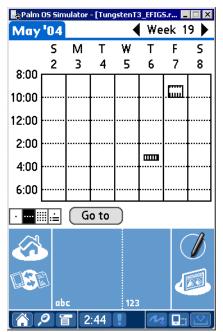
#### DayView

From the **SmartOffice** tab, select **Calendar** to open the DayView calendar. The DayView is used to display the activities for a specific day. The activities of a previous or future day can be displayed by tapping the left or right arrows.



#### WeekView

The **WeekView** is used to view activities for a specific week. The activities of a previous or future week can be displayed by tapping the left or right arrows.



#### **MonthView**

The **MonthView** is used to display activities for a specific month. The activities of a previous or future month can be displayed by tapping the left or right arrows.

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9	10 •	11	12	13	14	15	
16	17	18	19	20	21	22	
23	24	25	26	27	28	29	
30	31						
• ••••	·····∎ ≟ Go to						
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2:45 ! 🚧 🛄 🖄							

### AgendaView

The **AgendaView** is used to display a combination of timed and non-timed activities for a specific day. The activities of a previous or future day can be displayed by tapping the left or right arrows.

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May 7, 0	4 🖣 S N	и т w т	FS 🕨			
9:00 am Cunningham, John - John wil						
	erson ,Philip erson ,Norm					
•   • • •   ⅲ 🟥	Done (	6010	New			
ab	c	123				
( <u>^</u> ) [	2:45					

### Adding an Activity from the Calendar

- 1. From the **DayView** calendar, tap the **New** button to open the **Activity Details** tab.
- 2. Enter the activity information and then tap the **Done** button to save the activity.

Palm OS Simulator - [TungstenT3_EFIGS.r 💻 🗖 🗙					
May 7,	04				
Time	9:0	0 am Dui	r.60	- N	/linutes
Contact	) Cun	ningham	,Joh	n	
Location					
Subject					
🗢 Apj	point	ment	▼ S	ales	
(Reason)	Joh	n will be b	oring	ing o	ver
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Dor	ne	🗆 Priva	te [	🗹 Ті	racked
□ Alarm ▼ Normal					
(Done) (Go to) (Delete) (History)					
	(uv			(130	<u>, , , , , , , , , , , , , , , , , , , </u>
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					<b>1</b>
	abc		123		

# **Activity Components**

Time: Tap the Time button to specify the Start and End Time of an activity.

Contact: Tap the Contact button to link a contact to the activity.

Location: Enter the Location for the activity.

Type: Tap the Type drop-down arrow to display the activity type list.

**Reason**: Enter the Reason for the activity. If the reason takes up more than the space provided, tap the **Reason** button to open the **Details** tab and display the complete entry.

**Done**: Tap the **Done** button to save the activity.

**Private**: Select this option to designate the activity as private.

Tracked: Select the Tracked option to enter an Appointment into the Activity Tracking cycle.

Alarm: Select the Alarm option and then specify the amount of time before the activity to be reminded.

Priority: Tap the Priority Type drop-down arrow to specify the priority.

### Modifying an Activity from the Calendar

- 1. From the **SmartOffice** tab, select **Calendar** from the drop-down list to open the DayView calendar.
- 2. Tap the applicable activity to open the Activity Details tab.
- 3. Modify the information as necessary and then tap the **Done** button to save the changes.

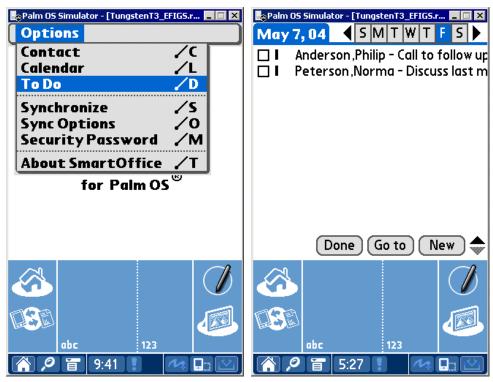
#### Deleting an Activity from the Calendar

- 1. From the **SmartOffice** tab, select **Calendar** from the drop-down list to open the DayView calendar.
- 2. Tap the applicable activity to open the Activity Details tab.
- 3. Tap the **Delete** button to display the confirmation dialog box.
- 4. Tap the **OK** button to delete the activity.



### To Do

From the **SmartOffice** tab, select **To Do** from the drop-down list to open the non-timed activities list.



### Adding a To Do Item

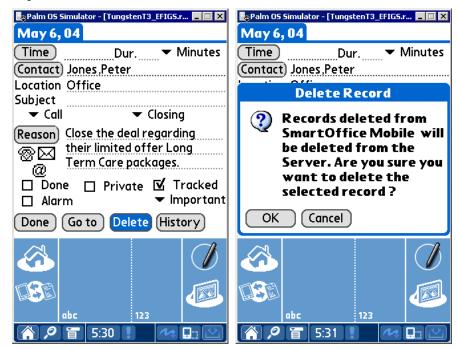
- 1. From the **SmartOffice** tab, select **To Do** from the drop-down list to open the non-timed activities list.
- 2. Tap the **New** button to open the **Activity Details** tab.
- 3. Enter the non-timed activity information and then tap the **Done** button to save the activity.

### Modifying a To Do Item

- 1. From the **SmartOffice** tab, select **To Do** from the drop-down list to open the non-timed activities list.
- 2. Tap the applicable To Do item to open the Activity Details tab.
- 3. Make the modifications as necessary and then tap the **Done** button to save the changes.

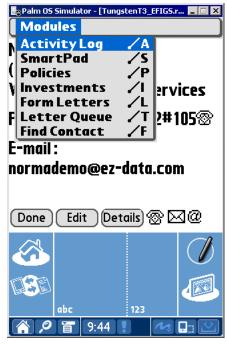
# Deleting a To Do Item

- 1. From the **SmartOffice** tab, select **To Do** from the drop-down list to open the non-timed activities list.
- 2. Tap the applicable To Do item to open the Activity Details tab.
- 3. Tap **Delete** to display the confirmation dialog box.
- 4. Tap the **OK** button to delete the To Do item.



# **Contact Menu**

From the Contact View, tap the Contact View tab to display the modules drop-down list.

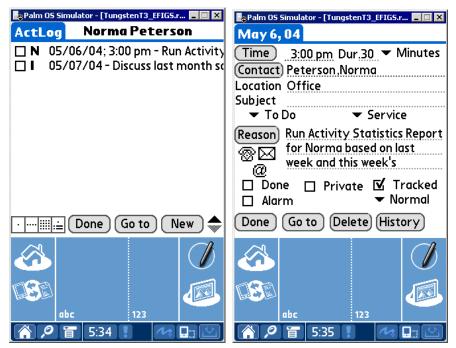


# **Activity Log**

The Activity Log is a list of the activities linked to a particular contact that is used to display, add and modify activities.

# Adding a Timed Activity from the Activity Log

- 1. From the Contact View, tap the **Contact View** tab to display the modules drop-down list.
- 2. Tap Activity Log to open the ActLog tab.
- 3. Tap the **New** button to open the **Activity Details** tab.
- 4. Enter the activity information and then tap the **Done** button to save the activity.



### Adding an Non-timed Activity from the Activity Log

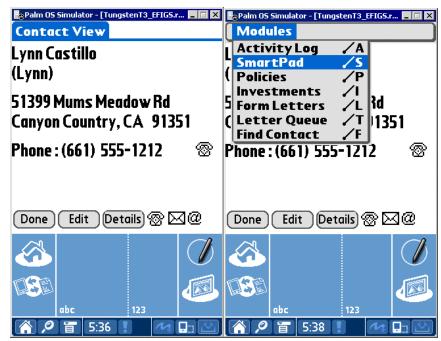
- 1. From the Contact View, tap the Contact View tab to display the modules drop-down list.
- 2. Tap Activity Log to open the ActLog tab.
- 3. Tap the **New** button to open the **Activity Details** tab.
- 4. Enter the activity information without entering a time and then tap the **Done** button to save the activity.

#### **SmartPad**

SmartOffice® Mobile is used to view, add, and delete **SmartPad** records that are synchronized with the SmartOffice database. Note that only those **SmartPad** entries that are added with SmartOffice Mobile for Palm OS® that are not synchronized with SmartOffice can be modified.

# Adding a SmartPad Note

1. From the **Contact View** tab, tap **Contact View** and then select **SmartPad** from the drop-down list of modules to display the **SmartPad** tab.



2. Tap the **New** button to display the **Details** tab. Enter the SmartPad note and then tap the **Done** button to save the additions.

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Details	SmartPad Lynn Castillo
Lunch meeting to discuss College Education Funding.	Lunch meeting to discuss College Educa Type : BuyShare: 120.0Name: America Type: Mutual FundsName: American M Type : BuyShare: 266.164994Name: O
Done Delete Created:05/13/04	Done New
αbc         123	Image: Constraint of the second sec
🏠 🖉 👕 5:38 ! 🛛 🗛 🗔 🖄	🏠 🔎 🖀 5:39 🚦 🌆 🗠

# **Deleting a SmartPad Note**

- 1. From the Contact View tab, tap Contact View and then select SmartPad from the drop-down list of modules to display the SmartPad tab.
- 2. Tap the SmartPad note for deletion to open the **Details** tab.
- Tap the **Delete** button to open the Delete Record dialog box. 3.
- Tap the **OK** button to delete the selected record from the palm device and the server. 4.

#### Policies

SmartOffice is used to display the **Policies**, **Policy Details**, **Interested Parties**, and **Totals** tabs on the PDA.

Note: Policy information is read-only and cannot be added, modified or deleted from the PDA. 😓 Palm OS Simulator - [Tungsten T3\_EFIGS.r... 🔲 🕱 🛃 😓 Palm OS Simulator - [Tungsten T3\_EFIGS.r... 📮 🗖 🗙 🔤 Palm OS Simulator - [Tungsten T3\_EFIGS.r... **Frank Bartelo** Policies **Policy Details** Interested Parties Benefit Plan Name Plan A. Prem American Level 20 Role Name Relation 110000.2 Carrier American Level 750.00 ABC Life Primary ContBartelo, Frank Self Home Insurance 3040.00 0.00 Policy # 40050991 Primary Insur Bartelo, Frank Self CAT 350.00 0.00 PolicyType Life Owner Bartelo,Frank Self PolicyDate 06/22/01 Payor Bartelo,Frank Self Inforce Primary Advi: Anderson, Philip Status Mode/Prem Annually 750.00 100000.00 Basic Face 110000.25 NetDB Cash Value 0.00 Done Done Totals Done IntPrty 123 5:40 5:40 5:41

#### **Accessing Policy Information**

- 1. From the **Contact View** tab, tap **Contact View** and then select **Policies** from the drop-down list of modules to display the **Policies** tab.
- 2. Tap the policy to display the **Policy Details** tab.
- Tap the IntPrty icon to display the Interested Parties tab. 3.
- Tap the **Done** button and then tap the **Done** button again to return to the **Policies** tab. 4.
- 5. Tap the **Totals** icon to display the **Totals** tab.

#### Investments

The Investments, Investment Details, and Investment Totals tabs show read-only investment information for the Contact. The Variable Annuity information is limited due to this restriction.

#### Accessing Investment Information

- 1. From the **Contact View** tab, tap **Contact View** and then select **Investments** from the drop-down list of modules to display the **Investments** tab.
- 2. Tap the investment to display the **Investment Details** tab.
- 3. Tap the **Done** button and then tap the **Totals** button display the **Investment Totals** tab.

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Investments Joseph A	ckerman	Investment	Details		Investme	nt Totals	
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